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ABSTRACT

The role of principal as supervisor and evaluator of teachers is central to instructional leadership, and this means direct involvement through classroom observation and interaction with each teacher. Principals often neglect this role, with lack of time usually given as the reason. There are other reasons: Interacting with teachers about their teaching can be a sticky business, and they are often defensive and resentful. Principals often lack skill and training in the prerequisites for a good relationship; these include a repertoire of observational skills and recording techniques, a working knowledge of a range of instructional strategies, a set of interpersonal skills, and feedback strategies to use in conferences with teachers. There is evidence that these techniques are what teachers are looking for but in many cases are not getting. An appendix lists 31 desirable supervisory techniques for use prior to, during, and after a formal observation. A list of 14 references is provided. (DCS)

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Preface

Guided by recent research and the recommendations of national reports, educational policy makers at national, state, and local levels are increasingly recognizing the pivotal role of the school principal as the school's instructional leader. Accordingly, the Oregon School Study Council is pleased to add to its Bulletin series this insightful essay by Keith Acheson on the principal's role as an instructional leader.

For this Bulletin OSSC is indebted to the ERIC Clearinghouse on Educational Management, which commissioned Dr. Acheson to write the material. Acheson is associate director of the Clearinghouse as well as a professor of education in the College of Education's Division of Teacher Education. He is the author of Techniques in the Clinical Supervision of Teachers: Preservice and Inservice Applications (Longman, 1980) and Techniques in the Evaluation of Teachers (Confederation of Oregon School Administrators, 1982).

Philip K. Piele
Executive Secretary

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Introduction

School principals play many roles: public relations director, chief health officer, head disciplinarian, social director, business manager, and curriculum director, to name only a few. In response to surveys principals repeatedly report that the role of instructional leader is their most important responsibility. However, the amount of time spent is not consistent with this priority.

What kinds of activity would qualify as instructional leadership? Time spent observing classrooms, recording teacher and student behavior, and conferring with teachers about their teaching would surely count. Portions of faculty meetings dealing with curriculum, instruction, testing, and student diagnosis should also be included, as should committee meetings on similar topics.

Some activities that we shall eliminate for the purposes of this article are: selecting books for the library, dealing with student discipline, reading professional journals, and talking to parents. A case can be made for each of these as having important connections with ongoing instruction, but we shall limit our attention to those occasions when the principal is in direct contact with a teacher or teachers in respect to the instructional process. The form that this contact will take may vary. Several images come to mind: the captain with sword drawn, leading the charge; the coach in the huddle during a timeout diagramming a play; the sales manager giving a pep talk; the orchestra director conducting a rehearsal. All these examples have a leader who is assumed to have special knowledge and skill to direct

the activities of others.

In a school with thirty or more teachers, the idea of a principal maintaining close personal contact with each individual teacher in regard to their ongoing instruction seems remote. Moreover, the notion of a principal being an expert in every subject matter and grade level within the school is unreasonable. We have, however, expected the principal to be knowledgeable in respect to a range of generic teaching skills and a variety of strategies. Further, we have expected expertise in the process of observing classes, recording relevant data, and giving feedback to the teacher, in a useful way through helpful conferences and accurate reports.

The role of key evaluator of teacher performance seems nearly inescapable if the school principal is to retain any status as instructional leader. It is conceivable that this evaluative function could be delegated to others, but then the principal would be instructional leader in name only.

Delegating some of the tasks is a reasonable possibility. We believe that teacher colleagues, if so trained, could do a better job of providing formative evaluation and staff development than can line administrators. It is conceivable that a principal might retain the role of teacher evaluator but delegate the functions of instructional improvement through supervision, observation, and conferences. "Delegating" is one of the modes of leadership that Hersey and Blanchard see as appropriate for a mature and independent faculty.

At the other extreme from delegating is "telling"--being highly directive and authoritarian in one's approach to leadership. The

research on supervision of teachers does not recommend this approach to the instructional leader. Only if the highly directive moves are combined with highly indirect behaviors will teachers respond well.

Another approach to leadership is "selling." We mentioned the sales manager giving a pep talk to the sales force. This is sometimes effective with teachers as well, if the leader has the required charisma and enthusiasm. Teachers usually want some cognitive content in the persuasive message along with the emotional.

The most promising approach, generally, is "participating." Statements from teachers who feel they are not well supervised or evaluated reflect the absence of a sense that the supervisor has participated adequately to understand. "He's never taught this subject, himself." "How can an administrator who wasn't a very good teacher judge me?" "How can someone who hasn't taught for twenty years know what's going on?"

Hence, the principal who wants to play the participatory role needs to get involved in the classroom--taking a class, coteaching at times, substituting on occasion. Other opportunities arise in the planning, implementation, and assessment of new programs of instruction. Even if the principal takes a more passive role, he or she can enhance the feeling of participation through increased frequency of observations, for example. Conferences with teachers can be conducted in a manner that makes the teacher feel like a peer rather than a subordinate.

Supervision and Evaluation of Teachers

At the University of Oregon, my colleagues and I and our students have conducted a number of studies that have looked into what happens in the supervision and evaluation of teachers and what is to be preferred.

Tolliver (1972) analyzed the nature of interaction patterns in supervisory conferences to see if differences could be noted in the communication patterns between supervisors who had taken a workshop (Systematic and Objective Analysis of Instruction--SOAI--Hale and Spanjer 1968) and those who hadn't. Although the differences were not significant, Tolliver suspected, after listening to tapes of conferences, that the interaction patterns of the control group had been influenced by those who had taken SOAI training and similar workshops, prominent at that time, that stressed communication techniques such as paraphrasing and perception checking.

Shinn's 1976 study asked teachers whose principals had received training in Observations and Conferences with Teachers (Acheson and Hanson 1973) and teachers whose principals had not, what supervisory assistance they were receiving and what they would regard as ideal. He found that the training made significant differences in actual behavior and also increased the teachers' expectations in regard to ideal behavior.

Yarham (1972) found that a self-instructional program similar to the presenter-led workshop in Shinn's study also produced a number of significant differences when compared with a control group of untrained

supervisors.

More recently, Yoon (1983) trained a number of supervising teachers in Korean middle schools in the techniques of the Classroom Observations and Conferences with Teachers and found many significant differences between the trained group and a comparable control group as reported by student teachers using the items on Shinn's questionnaire. We are convinced that these techniques, listed in the Appendix, can be taught to supervisors and that they make a difference to teachers.

The appeal of these techniques appears to be universal. Adwani (1981) surveyed secondary school teachers, principals, and supervisors in Saudi Arabia and found that they expected all these techniques to be used more frequently in the future, even those that are seldom used now.

Khalil (1983) found a similar situation in Jordan and also noted a correlation between conference techniques of the supervisor and job satisfaction by the teacher.

Conditions for Supervision

If we are to help a teacher through the techniques of clinical supervision, several conditions need to be met. We need to have a set of standards or criteria of effective teaching. There needs to be a clear understanding or description of the teacher's job. There should be a nonthreatening procedure for the teacher to set goals in cooperation with the supervisor.

Several observations should take place, preceded by planning conferences and followed by feedback conferences. There should be

provisions for bringing in additional resources if the teacher has serious deficiencies and requires a special program of assistance.

Many of these conditions are mandated in some states as part of the teacher evaluation process. This helps to ensure that the conditions are met, but the psychology of evaluation may prevent the supervision cycle from being genuinely helpful. Many teachers feel threatened and intimidated by evaluation, hence find it hard to develop the trust needed for a successful clinical supervision relationship.

Several variables go into the mix when an observer shares data with a teacher. The relative importance of the different components will depend upon the situation. Teacher characteristics such as aggressiveness or being right- or left-brained may influence what will happen. In some cases the subject matter of the lesson observed may be the most important consideration. In other cases the strategy of instruction may be of major concern. Or characteristics or behaviors of certain students in the class might be of key interest.

Thus, to carry out classroom observation in a variety of circumstances, the observer needs a range of knowledge and skill to do the job well: knowledge of the subject matter being taught, understanding of the instructional strategy being used, ability to understand and interpret student behavior, access to a range of data collection devices, sensitivity to a variety of personalities among teachers, recognition of suitable outcomes or goals for the teacher, among others.

There is a natural order to dealing with many of these variables. One needs to be clear on the teacher's goals for self-improvement

before deciding how to help. Before observing a lesson one needs to know the topic, the teacher's objectives for students, and the strategy that will be used. When these are known, a technique can be selected for recording data. The point at which knowledge of personality types will be most useful is during the feedback conference following the observation.

Current Trends in Supervision

The role of clinical supervision has shifted in recent years; more and more it is becoming the formative part of teacher evaluation programs. In our own state, Oregon, a law that took effect in 1980 virtually mandates clinical supervision: preevaluation conference, multiple observations, postevaluation interview, and plans of assistance when needed.

There has also been a resurgence of interest in using the techniques of clinical supervision in preservice programs. We are aware of a number of universities and colleges that require their supervisors, cooperating teachers, and other field personnel to learn and use these techniques in working with student teachers and interns.

Results from research have also been consistent with the increased use of clinical supervision. Studies of "coaching" with teachers have underlined the need for consistent followup on the practice of new skills rather than "one shot" approaches. Clearer definitions of "teacher effectiveness" and "effective schools" have strengthened the criteria that underlie the goals of teacher supervision.

Research in the field of teacher supervision has also progressed. A California study (Shinn 1976) gave promise that the techniques can

be learned by supervisors and that they are desired by teachers. Since that time similar studies have been completed in Oregon, Saudi Arabia, Jordan, Korea, Alberta, and British Columbia.

There is another development or trend that seems important. The focus of instructional leadership is shifting. The techniques of working with teachers that we have advocated seem appropriate for supervisors of preservice teachers and for principals of inservice teachers. It may be that in the future the responsibility for instructional leadership will be shared by others in addition to the principal, who will concentrate on management.

Shinn found in 1976 that training produced significant differences in the behavior of supervisors, as reported by teachers. He also found that the teachers' notions of ideal behavior by supervisors changed along with the change in supervisors' actual behavior. The questionnaire for assessing actual and ideal behavior has been used in several ways. I used it for a self-report by administrators of their behavior before and after the enactment of a law governing teacher evaluation (1981). Adwani (1981) used it to ask secondary school teachers, supervisors, and principals in Saudi Arabia what was currently happening and what they expected in the future. Khalil (1983) used it in Jordan to survey teachers' perceptions of actual and ideal supervisory behavior and also linked these behaviors to job satisfaction. Yoon (1983) used it to tap the perceptions of student teachers in middle schools whose supervising teachers had or had not taken training in using the behaviors.

A persistent pattern emerges from this series of studies. Without

some concerted intervention, supervisors do not make use of the techniques of clinical supervision. Some of the interventions that have made a difference are training programs for supervisors and mandates in the form of legislation or regulation. There is also a pervasive acceptance and expectation of these techniques by teachers.

Reducing the Threat of Evaluation

A persistent problem also exists within the current and ideal situations. This is the tension between formative and summative purposes for supervision and evaluation. Most systems attempt to achieve staff development at the same time they are conducting assessment of competence. The potential threat of evaluation outweighs the potential benefits of systematic feedback and supervision, even though few teachers are evaluated negatively.

A reasonable solution for this problem is to have administrators serve as evaluators--making two observations per year--and to have additional observations made by colleagues for formative, developmental purposes. Data collected by colleagues would be shared with the evaluator only at the discretion of the teacher.

One of the prerequisites for a productive relationship between a teacher and an observer is a high level of trust. As studies have shown (for example, Ruch 1984), the kinds of goals that teachers set in negotiation with administrators are "safe" goals rather than ones that might make them vulnerable. This discloses a lack of trust on the part of the teacher. It is more likely that the teacher would share deeply felt desires for professional improvement with a colleague than with an evaluator.

Some other factors can contribute to a sense of security by teachers even when evaluation is being performed. A clear understanding of the criteria of competent performance that will be applied is one such factor. School districts should publish their standards and

see that each teacher has a copy. Another reassurance is a clearly stated job description that makes explicit the duties and expectations of the employee. Another factor that lends comfort is knowing what kinds of data will be collected in the course of supervision, observation, and evaluation. I recommend that teachers as well as supervisors take training in the techniques of classroom observation and feedback so that they may be knowledgeable recipients of observational data as well as potential recorders and sharers of classroom interaction.

Teachers can also be helped to have a peaceful state of mind about evaluation if they are given a copy of the formal report and allowed to discuss it with the evaluator. In the past, teachers have too often not known what was the basis of their evaluation or what was being said about them.

Several of the above factors are being required by law or regulation in some states and districts; published criteria or standards, job descriptions, negotiated goals, multiple observations, and shared evaluations are among the items being mandated. Another requirement that is gaining support is planned assistance for teachers who have deficiencies. The techniques for remediating a teacher who fails to meet required standards form a special category of clinical supervision. There are other special categories that we have tended to neglect in books about teacher supervision in the past. Despite what these books have said, not all teachers are the same.

Differences among Teachers

The striking differences among teachers become apparent in litigation and arbitration. Here the extreme cases show up. For

example, some teachers are so dogmatic as to oppose publicly the policies of the school board. The usual techniques of counseling and persuasion will probably not be effective with these individuals. Another unusual case is the teacher who is operating on a different set of values from those of the rest of the faculty. This difference will result in placing low priority on matters that others consider crucial and high priority on others' nonessentials.

How teachers deal with classroom management often becomes a legal concern or a matter for dismissal proceedings. Teachers who have trouble with classroom management vary from the extremely permissive to the unduly harsh or abusive. Difficulties with student discipline are the leading cause for dismissal cases that have been contested in the courts. A program of assistance for a teacher experiencing difficulty in this area needs to take into account the teacher's basic style and to incorporate strategies that are consistent.

The ways teachers deal with classroom disturbance range along a continuum running from aggressive to passive. Students' ways of coping can be similarly portrayed. We can go one step further and look at the coping behavior of the teacher and the supervisor in the conference. Thus we may imagine an aggressive student who shouts at his classmates and is shouted at by his teacher who, in turn, is shouted at by the supervisor. We could draw a similar analogy in which all the actors are passive and withdrawn.

Dealing with Teachers' Differing Styles

If we are to deal with the variations in personal style among teachers whom we might supervise, we need some organizers with rela-

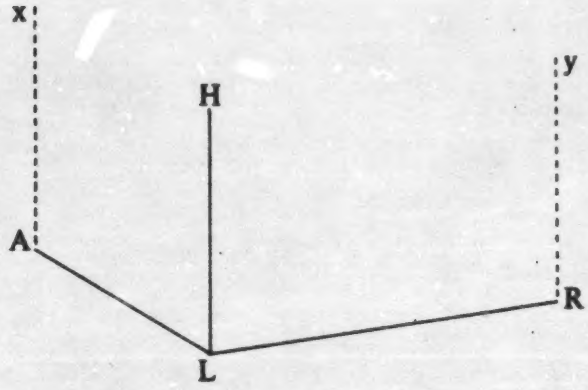
tively few categories. Let's begin with some outcomes that we'd like to achieve in any teacher. The research on teacher effectiveness would validate the desirability of teachers keeping their students on task, showing enthusiasm for teaching and for students, exhibiting clarity while teaching, and employing a variety of strategies and techniques.

Taking these qualities of effective teaching as goals, let us consider how we would deal with two extremes in teachers. Teacher X is aggressive, linear, caught up in the urgency of time, prone to be hostile, dogmatic about beliefs and standards, energetic.

Teacher Y is laconic, whimsical, flexible, friendly, relaxed.

Figure 1

Differences Between Teacher X and Teacher Y
According to Three Dimensions



Note: The dimensions of the diagram are left-brained to right-brained, "Type A" to "Type B," and lower to higher on values.

In terms of our diagram in figure 1, Teacher X is Type A (Friedman and Rosenman), left-brained, about halfway between lower and higher needs on Maslow's scale, and also at about the middle level on

Kohlberg's hierarchy of values. Teacher Y is Type B, right-brained, and somewhat higher on Maslow's and Kohlberg's hierarchies.

We need some clues to what kinds of communication will be effective to these two different kinds of teachers. In general, left-brained, Type A people will respond best to organized, sequential information. Moreover, if they are at Level III of Kohlberg's ladder, Level V arguments are not going to reach them. Right-brained, Type B people, on the other hand, can be appealed to by metaphors, analogies, and holistic approaches. They may enjoy an indirect approach and the opportunity to discover meaning in observational data for themselves.

In chapter 3 of Techniques in the Clinical Supervision of Teachers, Meredith Gall and I consider some aspects of direct and indirect styles of supervision. These styles can be matched to the characteristics of the teacher-client. Another variable over which we have some control is the type of data we will record and share with the teacher. Some forms of data are, by their nature, more direct and linear than are others; verbatim is certainly this type. In addition to having some control over the content of the communication (data) and the form of the communication (direct/indirect), we may also select the appropriate channel. Watching a videotape, hearing an audiotape, reading a verbatim, seeing a seating chart, or analyzing a timeline may affect the message that is received. The medium may indeed be the message.

Another variable that might be manipulated is the client. We're familiar with waiting to tell someone something until they're in a good mood or with wining and dining a prospective customer. A supervisor may set the scene in a way that affects the mood of the teacher.

Teachers who are being supervised may be in a number of psychological states. A common one is anxiety. It may be that a little anxiety or a moderate amount of stress can stir us up for our best efforts. There is a point, however, beyond which more anxiety becomes dysfunctional and stress becomes distress. Anxiety, like worry, feeds upon itself so that more of it stimulates the mechanism that creates even more. A supervisor who wants to avoid adding to this stress cycle must communicate reassurance.

Another common response is defensiveness. Teachers will rationalize irrational behavior, justify the unjustifiable, and defend the indefensible. Defensiveness is often touched off by a strongly opinionated, direct remark by the supervisor; keeping to objective observations and analytical (not evaluative) comments will help to avoid unnecessary defensive reactions.

Our classification system in figure 1 falls short of our goal of categorizing clients in a way that will guide us in knowing how to deal with them; however, it will help. If a person is driven by an urgency about time (as are Friedman and Rosenmans' "Type A's" and Lewis Carroll's white rabbit), then he or she will not respond well to a conference that seems wasteful of time. If a person is organized and sequential, he or she will resent a conference that digresses.

There are some other dimensions that may be important. A client who is extremely aggressive and dogmatic needs a different approach than one who is shy, passive, and tentative.

How one conducts the feedback conference will depend on several factors: the nature of the data to be shared, the psychological state

of the teacher, the supervisor's purpose. The data may be obvious and self-explanatory or may contain subtleties and complexities. The teacher may be confident or threatened, open or protective. The supervisor may be hoping for major change or simply aiming for pleasant reinforcement.

Role Analogies
for Clarifying the Supervisory Role

We can identify some literary archetypes that apply to supervisory roles and assign them categorical names. Cinderella's fairy godmother, Wanda, was playing the part of a mentor, a kindly and often indulgent role taken by one, usually older, in shaping the career of a protege. Merlin (at King Arthur's court) played the role of a maestro, or master of an art, who shares his knowledge and cunning with other, appreciative persons. Machievelli might be called a coach today--one who observes closely the performance of others over time and gives advice for improvement. Iago was a counselor to Othello, albeit not a benign one.

The principal as instructional leader may play any or all of these roles, but will tend to emphasize one over the others. Therefore, let us look at some of the dangers inherent in each. The mentor can work with only a limited number of proteges, whereas the school principal has a whole building full. To be a maestro in the symphony of learning that we conduct in schools requires being a master of many arts. Moreover, the principal is expected to be an impressario as well.

The coaching metaphor has been strongly advocated recently (see Joyce and/or Showers), and we tend to agree that this model fits the schools. One who wants to see teachers develop and improve continuously must observe carefully over time, understand and use a range of strategies, and employ techniques that communicate the knowledge of strategies and the information from observation to the teachers.

The counselor role is helpful up to a point; becoming involved in

the teacher's nonprofessional, personal affairs may be beyond the scope of an instructional leader.

The Principal as Coach

Because we have expressed a preference for the coaching role, let us pursue it a bit further. Can you imagine a world class Olympic coach merely saying to an athlete, "That was pretty good, but I know you can do better?" No, we expect to hear, "You're taking your eye off the target at the last instant. Let's look at the videotapes I made and compare them with those of your best performance." We would also be surprised to hear such a coach say that he or she would be around to watch two or three times during the year and then write a final report in the spring. We expect the coaching to be continuous and frequent, even after the athlete achieves world status.

How, then, shall we translate the coaching analogy into the real world of the principal? It seems that in a school of appreciable size (thirty or more teachers) the head coach needs some assistants. These need not be additional administrators, but may be other teachers who, during free periods or released time, can observe and meet with teachers who are working to achieve growth needs or to overcome deficiency needs.

Alternative Arrangements

For a number of years we have pondered the plight of the typical principal who must play the double role of supervisor and evaluator. We have tried to say and write things that would help make the situation more tolerable. Probably the best solution to this dilemma is to

train teachers to observe one another and to provide feedback for formative purposes as part of the staff development program. Formal evaluation for summative purposes--retention decisions, promotion, tenure--would still be the responsibility of administrators.

Another possibility is to use one set of administrators as supervisors and another as evaluators. Department heads in secondary schools would also be natural choices for the supervisory role. The data from supervisor observations would not be used for evaluation unless the teacher requested it.

Another alternative is peer evaluation. Teachers, beyond just helping each other to improve, can actually write formal, summative evaluations on one another. This has been done successfully at the junior college level, but is unlikely to gain acceptance at the elementary and secondary levels. Teacher organizations appear to be opposed to having their members engage in evaluating one another. The prevalence of collective bargaining and legal distinctions between supervisors and teachers also affect who can evaluate.

As we expand our notions of instructional leadership to include others than the building principal, various divisions of responsibility will take place. For the time being, evaluation will continue to be the responsibility of the principal in most cases, but there will be increasing pressure to provide supervision for instructional improvement, perhaps using other kinds of leadership roles.

Conclusion

We have emphasized the role of the principal as supervisor and evaluator of teachers. It is central to instructional leadership. Other matters such as curriculum guidance and assistance with student discipline are also important. But if a principal is to truly be the instructional leader, then direct involvement through classroom observation and interaction with the teacher cannot be neglected. Our earlier analogies all contain this element of direct involvement: the captain leading the charge, the coach in the huddle, the sales manager's pep talk, the orchestra conductor rehearsing.

Our experience with principals in the field suggests that they often neglect this role; lack of time is usually given as the reason. There are other reasons. Interacting with teachers about their teaching can be a sticky business. They are often defensive and resentful. Principals often lack skill and training in the prerequisites for a good relationship.

These prerequisites are as follows: a repertoire of observational skills and recording techniques, a working knowledge of a range of instructional strategies, a set of interpersonal skills, and feedback strategies to use in conferences with teachers. A number of these techniques have been discussed in the preceding pages and are listed in the Appendix. We have evidence that these techniques are what teachers are looking for but in many cases are not getting.

The studies of effective schools have placed great importance on the effectiveness of the principal. The principal's effectiveness depends, in large part, on instructional leadership.

Appendix

Desirable Supervisory Techniques

(Prior to a formal observation)

1. Evaluator meets with teacher.

2. Evaluator finds out what the teacher's lesson objectives are and what strategies he/she plans to use during the visit.

3. Evaluator finds out what the teacher expects students to be doing during the visit.

4. Evaluator finds out any concerns the teacher has and any problems he/she is having.

5. Evaluator involves the teacher in deciding what evaluator will observe and the type of data to be collected during the visit.

6. Evaluator helps the teacher translate his/her concerns into specific teaching behaviors which can be observed.

7. Evaluator suggests a variety of observational techniques which could be used during the visit.

8. Evaluator suggests methods which the teacher can use to gather data about his/ her teaching without help from others.

(During the formal observation)

9. Evaluator makes verbatim notes of selected parts of what the teacher says and what students say during the visit.

10. Evaluator writes the teacher's questions during the visit for later analysis.

11. Evaluator writes students' responses to teacher's questions for later analysis.

12. Evaluator records whether individual students are working at their assigned tasks or not.

13. Evaluator makes a chart to show patterns and amount of student response in class discussions.

14. Evaluator makes audio recordings of everything that is said in class.

15. Evaluator makes charts to show the physical movements of the teacher and/or the students during the visit.

16. Evaluator makes television recordings of the teacher and/or the students during the teaching process.

17. Evaluator observes and makes notes about the behavior of a specific child if the teacher has identified that child as a "problem" student.

18. Evaluator records his/her subjective feelings about whether the class is good or bad.

19. Evaluator stays for at least 30 minutes when he/she visits.

(After a formal observation)

20. Evaluator meets with the teacher after each visit to discuss what was observed.

21. Evaluator gives the teacher direct advice to improve instruction.

22. Evaluator gives the teacher opinions regarding the teacher's teaching.

23. Evaluator relates the teacher perceptions of the class to the objective observational data which was collected during the visit.

24. Evaluator encourages the teacher to make inferences and to express feelings and opinions about observational data which evaluator collected.

25. Evaluator asks the teacher questions during the conference which help clarify evaluator's opinions and feelings.

26. Evaluator encourages the teacher to consider alternative teaching techniques and explanations of classroom events.

27. Evaluator is willing to modify his/her objectives for the conference to accommodate teacher's priorities.

28. Evaluator listens more than he/she talks in a conference.

29. Evaluator acknowledges what the teacher says and shows that he/she understands what the teacher is saying.

30. Evaluator gives praise and encouragement for specific growth in the teacher's teaching skills which evaluator has observed.

31. Evaluator recommends resources such as books and training programs which deal with areas in which the teacher wishes to improve.

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